

**Maryland Health Benefit Exchange**  
**Contract No. DHMSO296492**  
**Work Plan (October 1, 2011 to April 30, 2012)**

DELIVERABLE	DESCRIPTION	DUE	FORMAT	KEY PERSONNEL	HRS	EXCHANGE STAFF INVOLVEMENT
<b>Work Plan</b>	<b>Work plan</b> detailing deliverables, elements, due dates and formats	Oct. 5	Outline	O'Keefe Fitzgibbon	NA	Review Approval
<b>Environmental Scan and Market Analysis</b>	<b>Audience identification and segmentation</b> Identify, segment and prioritize audiences in Maryland for the advertising and public relations campaign. Audiences for analysis/prioritization will include: <ul style="list-style-type: none"> <li>• families with children</li> <li>• individuals</li> <li>• young adults</li> <li>• seniors</li> <li>• vulnerable populations <ul style="list-style-type: none"> <li>– low income individuals and families</li> <li>– individuals with low health literacy or illiteracy</li> <li>– individuals with developmental or other disabilities</li> <li>– individuals with behavioral health needs</li> <li>– individuals and families lacking stable housing</li> <li>– individuals living in institutional settings</li> <li>– individuals involved with the criminal justice system</li> <li>– individuals with limited English proficiency</li> <li>– individuals with problematic citizenship status</li> <li>– racial/ethnic groups experiencing health disparities</li> </ul> </li> <li>• employers</li> </ul>	Oct. 17	PPT Report	O'Keefe Fitzgibbon Murphy Learch	150	Review Discussion Feedback Approval

	<ul style="list-style-type: none"> <li>• self-employed</li> <li>• health insurers and brokers</li> <li>• health care providers</li> </ul> <p><b>Best practices</b> Review existing research focused on effective communication and marketing of the new health benefits, both locally and nationally, specifically the state of Massachusetts, which has implemented a similar program successfully.</p> <p><b>Information gaps/research needs</b> Review research sponsored by the Exchange, including focus group findings from fall 2010, and assess if there are significant information gaps that should be addressed. Other sources of research that will be accessed if available include:</p> <ul style="list-style-type: none"> <li>• Publicly sponsored research</li> <li>• Academic research</li> <li>• Syndicated research</li> <li>• Qualitative research</li> </ul> <p>If research gaps exist, we will recommend additional primary research for consideration in gathering input and feedback for assessment of Maryland marketplace needs. This research may include the following:</p> <ul style="list-style-type: none"> <li>• Stakeholder interviews</li> <li>• Opinion leader/influencer interviews</li> <li>• Community service/public health organization/ institution interviews</li> <li>• Statewide public opinion survey</li> </ul> <p>Additional research, if recommended, would meet the following objectives:</p> <ul style="list-style-type: none"> <li>• Determine baseline awareness of healthcare reform, common associations, concerns and hesitations that surround it.</li> </ul>					
--	---	--	--	--	--	--

	<ul style="list-style-type: none"> <li>• Understand the key barriers and challenges that need to be overcome to generate attention for the Exchange and get people to sign up.</li> <li>• Assess motives for getting healthcare coverage, and signing on to the Exchange</li> <li>• Understand areas of weaknesses and vulnerability for the Exchange, as well as areas of opportunity.</li> <li>• Determine what type of value individuals derive from having healthcare coverage, and what value sources can be attached to the Exchange.</li> <li>• Identify good messengers and channels for communications surrounding the Exchange.</li> </ul> <p>Identification of information gaps will be based, in part, on how well existing research answers the following:</p> <ul style="list-style-type: none"> <li>• How do individuals and organizations respond to and plan to use the new health care delivery system?</li> <li>• What level of awareness exists around the healthcare policy changes, the introduction of Exchanges, and in particular the Exchange for Maryland?</li> <li>• What outreach is needed to engage providers, employers, insurers, brokers and others affected by reform?</li> <li>• What do key markets, including uninsured and privately insured consumers and vulnerable populations, currently think about healthcare reform and the Exchange for Maryland?</li> <li>• Which communications messages are more compelling among these groups in order to prepare, educate and motivate them to find out if health insurance through the Exchange is right for them?</li> <li>• Which brand identities (brand name and graphic image) – ring true for them and effectively communicate the purpose and benefits of the Exchange?</li> <li>• After the divisive national healthcare debate, how can The Exchange be positioned as a consumer-facing initiative, so that</li> </ul>					
--	--	--	--	--	--	--

	<p>the populations in need of healthcare see this as a viable option that relates to their needs, vs. a partisan-charged political entity.</p> <ul style="list-style-type: none"> <li>To what extent, if at all, are assumptions surrounding health care reform a barrier to The Exchange and how can they be minimized?</li> </ul> <p><b>Syndicated research</b> Employ syndicated research that provides data offers localized to Maryland specifically. Research will focus on media usage by audience segment through the Media Audit, which correlates Marylanders' media usage habits with various demographic and lifestyle factors. In addition we will look at geographic considerations in blanketing the state with a communications campaign, and factors affecting message segmentation by audience.</p> <p><b>Materials compilation</b> Gather and review existing materials and examples of communications from federal and other sources.</p>					
<b>Options Development/ MD-Specific Analysis of Options</b>	<p><b>Report of options</b> for consideration in reaching and engaging Maryland consumers. Options will be specific with regard to audience segmentation and local market considerations that would influence successful implementation of a communications program.</p> <p><b>Maryland-specific options</b> will be analyzed for feasibility and applicability, particularly with regard to the state population, audience segmentation, obstacles and challenges to reaching specific audiences, and the overall health care environment in Maryland.</p>	Nov. 1	PPT Report	O'Keefe Fitzgibbon Murphy	400	Review Discussion Feedback Approval

	<p><b>Information content and format</b></p> <p>We will determine the information content and formats best suited for the success of the Exchange’s advertising and public relations campaign. This will include assessment of the effectiveness of various information formats including:</p> <ul style="list-style-type: none"> <li>• Fact-based</li> <li>• Q&amp;As</li> <li>• Storytelling and personalization</li> <li>• Visualization</li> </ul> <p>In addition, this assessment will determine communications channels and content that achieve the following:</p> <ul style="list-style-type: none"> <li>• Identify most trusted sources of information</li> <li>• Ensure consistency of message content</li> <li>• Address misinformation and common myths</li> <li>• Clarify benefits and responsibilities</li> <li>• Explain eligibility and enrollment</li> <li>• Communicate effective dates when changes will occur</li> <li>• Highlight coverage of behavioral health benefits</li> <li>• Promote culture of wellness and prevention</li> <li>• Explain concept of medical homes</li> </ul> <p><b>Success factors</b></p> <p>We will determine what factors will help ensure the success of the Exchange’s advertising and public relations campaign by assessing the importance of the following:</p> <ul style="list-style-type: none"> <li>• Reach and frequency of campaign messages</li> <li>• Audience impressions, web visits, phone inquiries, etc.</li> <li>• Event attendance</li> <li>• Anecdotal feedback of consumers, community leaders and other stakeholders</li> <li>• Successful segmentation of messages by audience</li> <li>• Cultural competency</li> <li>• Use of clear explanatory language</li> <li>• Translation into multiple languages</li> </ul>					
--	--	--	--	--	--	--

	<ul style="list-style-type: none"> <li>• Credible, trusted spokespersons and endorsers</li> <li>• Message consistency</li> <li>• Pervasive and persistent messaging</li> <li>• Success in reaching health care decision-makers</li> <li>• Success in engaging third-party advocates and influencers</li> </ul> <p><b>Tracking and anticipating federal guidance</b> We will prepare for the issuance of federal guidance regarding advertising and public relations strategies and anticipate how to incorporate any guidelines in the design and development of the Exchange's campaign.</p>					
<b>Final Report</b>	<p><b>Final report</b> with communications recommendations including the following:</p> <p><b>Mix and weight of communications approaches</b></p> <ul style="list-style-type: none"> <li>• Web content</li> <li>• Paid consumer advertising</li> <li>• Paid advertising to small business owners</li> <li>• Public service advertising</li> <li>• Media relations</li> <li>• Community education/outreach</li> <li>• Social media/marketing</li> <li>• Mobile marketing</li> <li>• Word of mouth/grassroots</li> <li>• Third-party endorsers</li> <li>• Employer outreach</li> <li>• Marketing partnerships/promotions</li> </ul> <p><b>Partnerships with other organizations</b></p> <ul style="list-style-type: none"> <li>• State government agencies</li> <li>• Foundations</li> <li>• Community organizations</li> <li>• Advocacy groups</li> </ul>	Nov. 7	PPT Report and Handout	O'Keefe Fitzgibbon Murphy	50	Review Discussion Feedback Approval

	<ul style="list-style-type: none"> <li>Human service organizations</li> </ul> <p><b>Feedback solicitation and processing plan</b> We will advise on how feedback regarding the recommended direction of the campaign will be solicited, evaluated and incorporated in the design and development of the Exchange's campaign. Feedback and evaluation channels may include some or all of the following:</p> <ul style="list-style-type: none"> <li>Exchange Board</li> <li>Advisory committee(s)</li> <li>Legislative hearings</li> <li>Public hearings</li> <li>Public comment solicitation</li> <li>Web posting of plan</li> </ul>					
<b>Feedback Phase</b>	<b>Feedback</b> on analysis and options presented in Final Report from Maryland stakeholders, the Exchange Board and Advisory Committees.	Nov-Dec	NA	O'Keefe Fitzgibbon Murphy Learch	TBD	Feedback
<b>Communications Materials</b>	<p><b>Communications materials</b> may involve the following tasks, to be determined upon further direction from the committee:</p> <ul style="list-style-type: none"> <li>Develop message bank, with segmentation by target audiences</li> <li>Develop facts presentation, Q&amp;As, storytelling, visualization and other communications approaches</li> <li>Determine formats for printed materials, advertising, etc.</li> <li>Identify and develop communications for most trusted information sources, authoritative influencers in the community</li> <li>Identify and develop materials to fill identified information gaps</li> <li>Language customization across materials</li> </ul>	Nov-Apr	TBD	O'Keefe Fitzgibbon Murphy Bramlett	TBD	TBD

	<ul style="list-style-type: none"> <li>• Key materials for user testing and comprehension</li> <li>• Talking points and presentation materials for trusted spokespersons and endorsers</li> <li>• Materials for media and other communications channel managers/gatekeepers</li> </ul>					
<b>Future Analytic Work</b>	Weber Shandwick will provide additional analytic work and consultation as required through the duration of the contract.	Nov-Apr	TBD	O'Keefe Fitzgibbon Murphy Bramlett	TBD	TBD